Pyramid Overrides
Menu Overrides

Gim P. Hom

Acton Finance Committee

Pyramid Reference Sources

- Rules and instructions for Pyramid and Menu Overrides provided by MA DOR documents:
  - Proposition 2½ Ballot Questions: Requirements and Procedures
  - MA DOR Informational Guideline Release Chapter 229 of the Acts of 1987, Guideline 3: "If more than one override question is approved, the question with the greater amount will be the one which applies."

Pyramid Override*

- A pyramid override asks voters to determine which, if any, of two or more funding levels they are willing to approve.

- A separate override question would be placed on the ballot for each funding level, with each question stating the same purpose.

- Any question is approved if a majority of the persons voting on that question voted "yes."

- If more than one question is approved, the question specifying the <u>highest dollar</u> amount governs.

* DOR quotations

Ballot Mechanics

- Voter instructions: "Vote Yes or No on EACH of the following questions. Questions 3A, 3B, and 3C are separate questions. Each question requires a majority of those voting to pass. If more than one question passes, only the question with the highest dollar amount will prevail"*

* MA DOR recommended language.

Actual Ballot – Concord 2002

QUESTION 3 INSTRUCTIONS TO VOTERS:
Vote Yes or No on EACH of the following questions. Questions 3A, 3B, and 3C below are separate questions. Each question requires a majority of those voting on it to pass. If more than one question passes, only the question with the highest dollar amount will prevail.

QUESTION 3A

Shall the Town of Concord be allowed to assess an additional $396,586 in real estate and personal property taxes for the purposes of funding the Town's apportioned share of the CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT operating budget, for the fiscal year beginning July first, two thousand and two?

YES ⬭
NO ⬭

QUESTION 3B

Shall the Town of Concord be allowed to assess an additional $333,854 in real estate and personal property taxes for the purposes of funding the Town's apportioned share of the CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT operating budget, for the fiscal year beginning July first, two thousand and two?

YES ⬭
NO ⬭

QUESTION 3C

Shall the Town of Concord be allowed to assess an additional $221,437 in real estate and personal property taxes for the purposes of funding the Town's apportioned share of the CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT operating budget, for the fiscal year beginning July first, two thousand and two?

YES ⬭
NO ⬭

Override Voting Details

Highest amount prevails

	Override Amount		
	Question 3A $396,586	Question 3B $333,854	Question 3C $221,437
Yes	1,840	**2,009**	**2,395**
No	1,934	1,784	1,395
Blanks	101	82	85
	Failed	Passed **Prevailed**	Passed

Towns Using Pyramid Override

- Concord – 2001: 2 pyramid overrides passed (local and regional schools).
- Concord – 2002: 2 pyramid overrides passed (local and regional schools).
- Needham - 2002: override fails.
- Concord – 2003: 2 pyramid override (mid, low amount passes.)
- Concord – 2004: highest amount passes (2-articles).

Belmont – 2002: presented options at Town Meeting.

Concord Results

12-Jun-01
Question 3A
General Override CCHS Op Budget
$617,822
$510,123
$226,742

12-Jun-01
Question 4A
General Override Concord PS
$1,835,444
$1,593,096
$1,374,099
$933,835
$694,445

14-May-02
Question 2A
General Override Concord PS
$1,066,419
$855,919
$740,309
$527,000

Question 3A
General Override CCHS Op Budget
$396,586
$333,854
$221,437

Needham – Nov 2002 Results

Votes	Question #4a $6,970,000	Question #4b $5,656,000	Question #4c $4,650,000
Yes	**4573**	**5176**	**6559**
H/C	5	5	7
No	**9178**	**8536**	**7324**
H/C	8	8	6
Blanks	767	806	635
H/C Blanks	1		1
TOTAL	14532	14532	14532

~$69M Operating Budget, vote count math error

Belmont Override – April 2002

- April 2002 Town Meeting*: BOS presented the 3 possibilities to Town Meeting for an advisory vote.
  - Dramatically reduced service budget of $68 million with no additional revenues.
  - Reduced service budget of $70.4 million funded in part by an operating override of $2.4 million.
  - Level service budget of $72 million funded in part by an operating override of $4 million.

- $2.4M option preferred by wide margin at town meeting.

- June 2002 Ballot: Only $2.4M override presented to the voters. Ballot passed.

* Representative town meeting: 288 reps, 9 at large reps.

Other Towns Which Have Used Pyramid Overrides

- Ashby, Belchertown, Berlin, Carlisle, Cohasset, Concord, Dracut, Duxbury, Hingham, Holbrook, Lancaster, Marshfield, Montgomery, North Andover, Norwell, Raynham, Sudbury, Westhampton, Wilbraham

Menu Overrides

- A community may place several override questions each of which will fund different services or programs on the same ballot.

- If voters approve more than one override question stating different purposes, the community's levy limit may be increased by the total of the amounts specified in all approved questions.

- Reference source: Proposition 2½ Ballot Questions: Requirements and Procedures

Menu Examples

- Shall the Town of --- be allowed to assess an additional $250,000 in real estate and personal property taxes for the purposes of funding the Fire Department for the fiscal year beginning July 1, _____?

- Shall the Town of --- be allowed to assess an additional $250,000 in real estate and personal property taxes for the purposes of funding the Police Department for the fiscal year beginning July 1, _____?

- Shall the Town of --- be allowed to assess an additional $100,000 in real estate and personal property taxes for the purposes of funding the Public Library for the fiscal year beginning July 1, _____?

Recent Acton Voter History

Date	Amount	Yes	No	Blanks	Comments
5/1999	$1.184M Schools	3003	**3799**	25	
5/2000	$6M Carlisle Rd Purchase	1711	**2116**	57	
11/2002	Abolish State Income Tax	3024	5116	759	Referendum
11/2002	CPA	**4656**	3813	480	Potential matching funds
11/2002	Public Safety Building	**4750**	3816	983	
4/2003	$3M	**3769**	3313	57	

Issues

- Pyramid/Menu overrides and Menu overrides will increase burden on Town staff and School staff.
- Voters may not understand trade-offs in Pyramid/Menu overrides.
- Voters may not understand Pyramid/Menu override mechanics.
- How many options?
- Highest dollar option has prevailed.

Concluding Questions

- Should voters be given a choice of overrides? Go for all or none: A budget and B budget only? Will a pyramid override increase the likelihood of passing some level of an override in today's economic environment?

- Ballot/Town Meeting sequence (timing); with a Pyramid/Override ballot, may be more informative have ballots after discussions at Town Meeting. Discussion could occur at State of the Town meeting.